

Impact of Downsizing on Systems Integration Market

John Willmott
Consultant

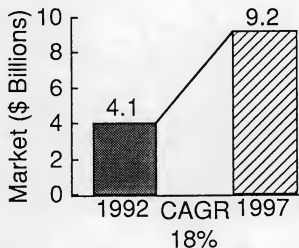
Notes

11/23/92

© 1992 by INPUT. Reproduction Prohibited.

INPUT

Systems Integration Market—Europe, 1992-1997



INPUT

E-SI-113

Notes

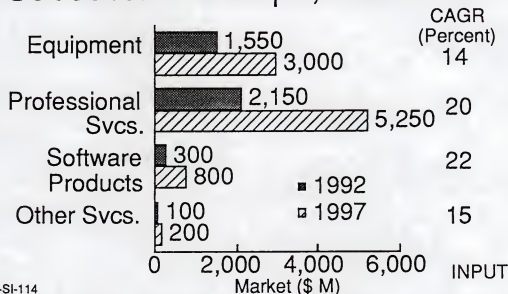
10/13/92

© 1992 by INPUT. Reproduction Prohibited.

INPUT



Systems Integration by Subsector—Europe, 1992-1997

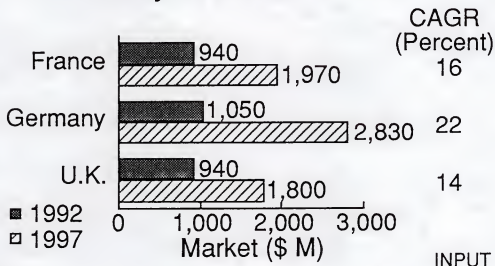


E-SI-114

Notes

Systems Integration, Europe

Country Market Growth



E-SI-103

Notes



Software and Services, Europe

Seeking Cost Reductions for IT

- Downsizing
- Outsourcing
- 80% solutions

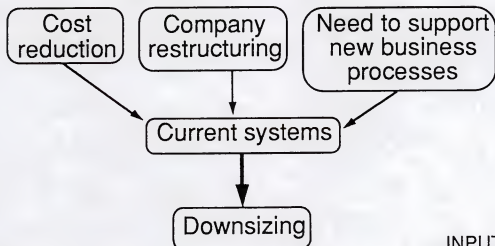
INPUT

E-OU-59

Notes



Driving Forces Downsizing, Europe



E-SI-109

INPUT

Notes



SI Projects by Equipment Type—Europe, 1991

Equipment Type	% of Contracts	Value (\$ M)
Mainframe	28	1,000
Proprietary midrange	15	500
UNIX-based midrange	35	1,200
PC or PC/LAN	22	800
Total	100	3,500

INPUT

E-SI-102

Notes



Systems Integration, Europe

Major Purchasing Influence, 1991

Major Purchasing Influence	Share of Total Mkt. (%)	Value (\$ M)
IS director or managers	40	1,400
CEO or end user management	60	2,100
Total	100	3,500

INPUT

E-SI-100

Notes



Who Drives Downsizing?

Personnel	Degree of Influence
CEO	Medium
Finance director	High
IT director/DPM	Low

E-SI-118

INPUT

Notes



Case Study 1

Impact on IS Systems

- Phase 1—Replacement of commercial and financial systems
- Phase 2—Complete computer-integrated processing
- Current emphasis—Cost reduction and customer service

INPUT

E-SI-119

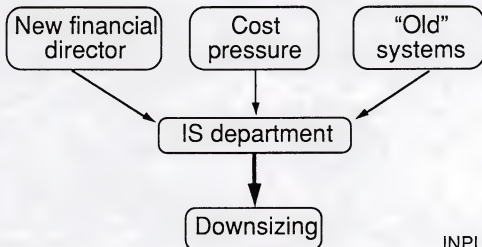
Notes

11/23/92



Case Study 2

Reasons for Downsizing



E-SI-120

Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems in the UK is estimated to be 10% (Mental Health Foundation 2000).

There is a growing awareness of the need to address the needs of people with mental health problems. The Department of Health (2000) has set out a strategy for mental health care, which aims to improve the lives of people with mental health problems and to reduce the burden of mental health problems on society. The strategy is based on three main principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

The strategy is based on the following assumptions: (1) that people with mental health problems are individuals with unique experiences and needs; (2) that people with mental health problems are capable of recovery; (3) that people with mental health problems should be treated with respect and dignity; and (4) that people with mental health problems should be given the opportunity to participate in decisions about their care and treatment. The strategy is based on the following principles: (1) to promote the recovery of people with mental health problems; (2) to provide a range of services to meet the needs of people with mental health problems; and (3) to ensure that people with mental health problems are treated with respect and dignity.

Changing Role of IS Department/Downsizing, Europe

- Developing closer relationships with user departments
- Greater decentralization
- More emphasis on business/systems analysis
- Less emphasis on systems development

INPUT

E-SI-98

Notes



Changing Role of End Users

- Acquiring control of IS strategy
- A major force in applications software product selection
- Taking over the IS budget

E-SI-121

INPUT

Notes

11/23/92

the 1990s, the number of people in the UK who are employed in the public sector has increased by 1.5 million, from 2.5 million in 1980 to 4 million in 1995 (Department of Health 1996). The number of people employed in the health service has increased by 1.2 million, from 2.2 million in 1980 to 3.4 million in 1995.

There is a growing emphasis on the need to improve the efficiency of the health service, and to ensure that the health service is able to meet the needs of the population in a cost-effective manner. This has led to a number of initiatives, including the introduction of the Health Service Act 1990, which introduced a new framework for the health service, and the introduction of the Health Service Act 1997, which introduced a new framework for the health service. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1990 introduced a new framework for the health service, which was based on the principle of 'patient choice'. The Health Service Act 1997 introduced a new framework for the health service, which was based on the principle of 'patient choice'.

Mainframe Downsizing, Europe

Target Architectures

Architecture	Percentage	Trend
IBM AS/400	40	Decreasing
UNIX-based	35	Increasing
Other proprietary	25	Decreasing rapidly

INPUT

E-SI-112

Notes

10/13/92

© 1992 by INPUT. Reproduction Prohibited.

INPUT

the 1990s, the number of people in the world who are undernourished has increased from 600 million to 800 million.

There is a growing awareness of the need to address the problem of food security. The United Nations World Food Programme (WFP) has been established to coordinate international efforts to combat hunger. The World Bank has also established a Global Food Security Programme (GFSP) to support countries in developing sustainable food systems.

One of the key challenges in addressing food security is the need to increase agricultural productivity. This can be achieved through a number of measures, including:

- Improving access to land and water resources
- Increasing the use of fertilizers and pesticides
- Adopting improved farming practices
- Investing in agricultural research and development

Another key challenge is the need to reduce food losses and waste. This can be achieved through a number of measures, including:

- Improving storage and transport facilities
- Reducing food waste at the household level
- Improving food safety and quality standards
- Promoting sustainable consumption patterns

Finally, it is important to ensure that food is distributed equitably. This can be achieved through a number of measures, including:

- Improving access to markets and distribution networks
- Supporting small-scale farmers and producers
- Implementing social safety nets for vulnerable populations
- Promoting food sovereignty and self-reliance

Addressing the problem of food security is a complex task that requires the coordinated efforts of governments, the private sector, and civil society. By working together, we can ensure that everyone has access to enough food to live a healthy and productive life.

Impact of Downsizing on IS Budgets

Service Component	Expenditure Trend
Equipment	Large decrease
In-house IS personnel	Large decrease
Consulting services	Increasing

INPUT

E-SI-111a

Notes



Impact of Downsizing on IS Budgets

Service Component	Expenditure Trend
External custom SW development	Small increase
Application SW products	Large increase
Network integration	Increasing

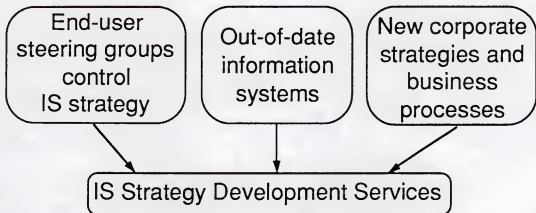
E-SI-111b

INPUT

Notes



Driving Forces—IS Strategy Development Services



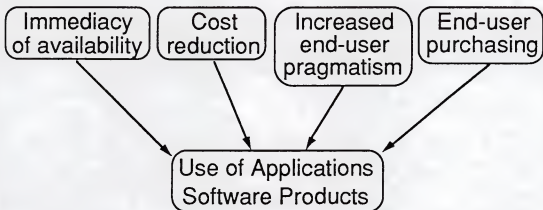
E-SI-122

INPUT

Notes



Driving Forces—Increased Use of Applications SW Products

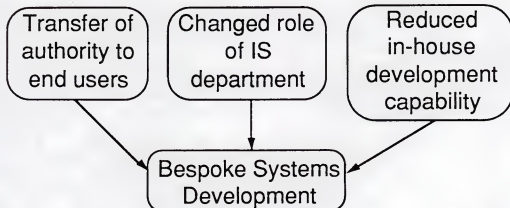


E-SI-123

INPUT

Notes

Driving Forces—Bespoke Systems Development



E-SI-124

INPUT

Notes



Systems Integration, Europe

Market Segmentation, 1991

Market Segment	Share of Total Mkt. (%)	Value (\$ M)
Networking/infrastructure development	26	900
Application/business solutions	74	2,600
Total	100	3,500

INPUT

E-SI-101

Notes

10/13/92

